

Quick Reference Tip Sheet

NEW: 01/05/2015

General Information


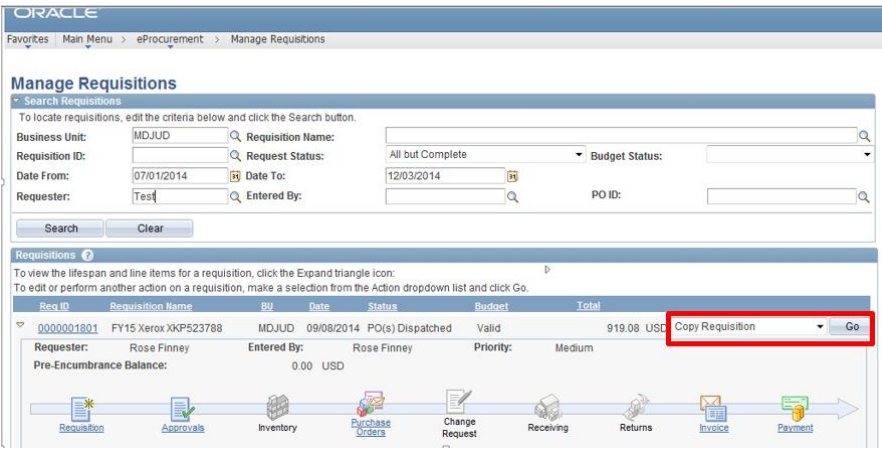
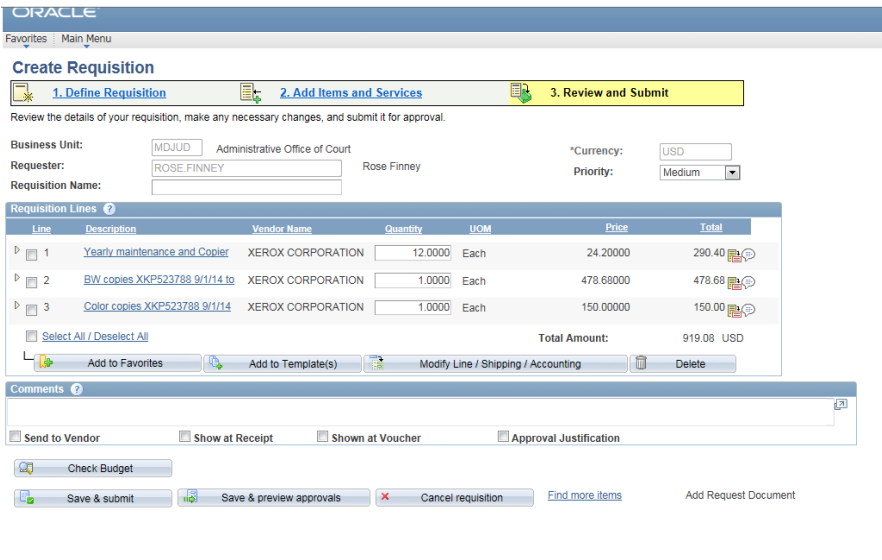

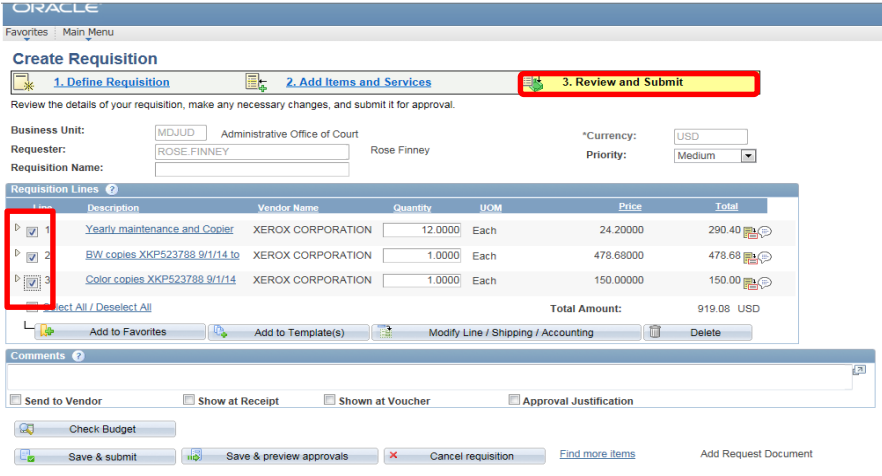
Task	Process Information
Creating a Requisition Template (for Recurring Requisitions)	<p>NOTE: As a prerequisite, please see the tip sheet for “Creating an eProcurement Requisition”.</p> <p>Once created, an ePro Requisition and the associated line items can be saved as a template for recurring use. NOTE: Templates are unique/personal to a Requester.</p> <p>Use of a Template is the preferred method for recurring orders. The Copy Requisition method is an alternative, though <u>not</u> recommended because unwanted information may be unintentionally included. For example, you would not want the old Buyer Name to be carried forward on the new requisition, as this could delay/prevent sourcing to a purchase order. The Template method will default the Buyer to “Field_Buyer” (or blank), so your new requisition can be assigned to a Procurement Buyer and then sourced to a purchase order.</p>

GEARS Navigation

eProcurement > Manage Requisitions	
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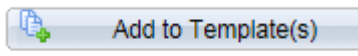
1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	<p>A. Find the requisition to be used as the source. (NOTE: Use the fields in the Search Requisitions section to narrow your search results).</p> <p>B. Choose "Copy Requisition" from the dropdown.</p> <p>C. Click the  button.</p>	
2.	The requisition will be copied, and the Create Requisition page will open.	
3.	<p>On the  3. Review and Submit tab, choose the lines to be saved on the template.</p>	

4.

Click the



button.

Information carried over for each requisition line includes: Description, Vendor, Quantity, UOM, Price, Location, and Account.

NOTE: Account is the only chartfield stored on the template.

ORACLE
Favorites Main Menu

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: MDJUD Administrative Office of Court *Currency: USD
Requester: ROSE.FINNEY Rose Finney Priority: Medium
Requisition Name:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Yearly maintenance and Copier	XEROX CORPORATION	12.0000	Each	24.20000	290.40
2	BW copies XKP523788 9/1/14 to	XEROX CORPORATION	1.0000	Each	478.68000	478.68
3	Color copies XKP523788 9/1/14	XEROX CORPORATION	1.0000	Each	150.00000	150.00

Select All / Deselect All Total Amount: 919.08 USD

Add to Favorites **Add to Template(s)** Modify Line / Shipping / Accounting Delete

Comments

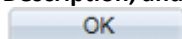
Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget

Save & submit Save & preview approvals Cancel requisition Find more items Add Request Document

5.

Enter a Template Name and Description, and then click the



button to save the template.

NOTE: Make the Name and Description meaningful, so you can easily identify the template later.

ORACLE
Favorites Main Menu

Add Selected Items to Template(s)

You have no Personal Template(s).

Add a new template

Template Name: Copier Template
Description: Copier Maintenance and Copies

OK Cancel

6.

You can cancel this requisition.

NOTE: This action cancels the Requisition, but not the Requisition Template.

ORACLE
Favorites Main Menu

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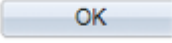
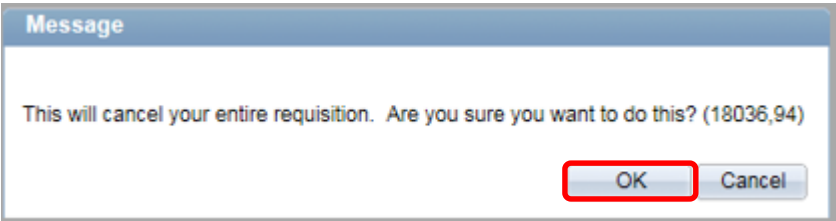
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Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget

Save & submit Save & preview approvals **Cancel requisition** Find more items Add Request Document

7.	<p>When you receive the cancel message, click the  button.</p> <p>NOTE: This action cancels the Requisition, but not the Requisition Template.</p> <p>DONE! When you are ready to order the same goods again, you can use your new template!</p>	
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**Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.